Project Closeout Report

Project Name: UCIS Replacement Project

Agency: Unified Judicial Branch

Business Unit/Program Area: State Court Administrator's Office

Project Sponsor: Sally Holewa

Project Manager: Jim Gienger

Phase 1 Objectives	Measurements	
	Met/ Not Met	Description
Capture and document business and technical requirements from the following portfolio teams: • Case Flow • Interfaces • Administrative	Met	A matrix of all business and technical requirements were created for incorporation into the RFP. The portfolio teams documented 804 requirements in 14 major categories and 70 subcategories and defined each as either "Desired" or "Required".
Release RFP by May 2, 2008 that includes, but not limited to: • Terms and Conditions • Background Information • Vendor Requirements • Technical and Business Requirements • Evaluation Criteria	Met	A complete RFP was authored and released upon its review and approval by the Court and others, including ITD Policy and Planning. The RFP was released on April 8, 2008 and was sent to over 40 vendors. Nine vendors submitted proposals by the May 21, 2008 deadline.
Select vendor by October 2008	Met	Through a defined evaluation process, a vendor was selected for the implementation of a COTS solution. The nine proposals were reviewed, three were invited to present their proposal and demonstrate their solution. The evaluation team visited sites of the two finalists. A Notice of Intent to Award was sent to the nine vendors on August 28, 2008 announcing Tyler Technologies has been selected.
Develop an implementation budget by early September	Met	An implementation budget will be submitted to the next Legislative Assembly for their consideration. The project budget has been defined and approved by the Operations Oversight Group and the Court Technology Committee.

Schedule Objectives			
Met/ Not Met	Scheduled Completion Date	Actual Completion Date	Variance
Met	10/1/2008	9/29/2008	Under schedule.

Budget Objectives			
Met/ Not Met	Baseline Budget	Actual Expenditures	Variance
Met	$200,000.00	$176,988.06	Under budget by nearly 12%.

Major Scope Changes
None.

Lessons Learned
Requirements Gathering – Start with a list of requirements from other sources, i.e., previous efforts, the National Center for State Courts, other courts. Create multiple teams to document and review requirements with each team having a narrow focus.   Have someone else review the requirements before they are finalized to ensure that they are understandable to someone who didn't work on them. **RFP –** Allow enough time to properly respond to vendor questions (We had 169 questions from vendors. Most were for clarification or further explanation of the requirements). **Evaluation Process –** Clearly define the entire evaluation process including the resource time commitment required. We scrambled a bit at the end because we had multiple evaluation processes (vendor demonstrations, site visits, reference checks, follow-up questions to the finalists, trial licenses of each software and hands-on testing of each product, and a final review of requirements and proposals) and did not realize the amount of extra time it would take to fit them all in.

Success Story
Requirements Gathering– The portfolio teams documented 804 requirements in 14 major categories and 70 subcategories and defined each as either "Desired" or "Required".   We clearly identified current functionality that we are unwilling to lose, as well as future functionality. The vendor responses showed that they were able to understand what we want now and what we are planning for the future. **RFP –** The RFP resulted in nine vendors responding. We are aware of other states receiving less than half that number of interested vendors. Vendors reported that they liked the way we laid out our RFP and felt is was one of the best they have seen. **Evaluation Process –** Throughout the evaluation process, the Operations Oversight Group kept going back to our original list of goals to measure how well each product would help us meet those goals. The goals were incorporated into our evaluation tools and reviewed with the individuals who participated in the evaluation. Keeping them in the forefront ensured that everyone was using the same criteria for evaluating the vendors and the products. At the end, there was unanimous agreement from the clerks of court all the way through the Supreme Court on which vendor and product would best fit our needs.